

# CRITICAL FACTORS FOR SUCCESSFUL PLANNING

- Partner involvement and commitment
- Decisions based on data (e.g., customer segments, community needs assessment)
- Clear focus on vision and priorities which leverage resources to make the biggest difference
- Measurable objectives
- The capability (human/financial) to carry out objectives
- Clear delineation of actions, responsibilities and timelines
- Plan in written form and communicated widely (e.g., all stakeholders)
- Mechanism to evaluate progress and make adjustments

## WRITING "SMART" OBJECTIVES

**S:** Specific/Single outcome

**M:** Measurable

**A:** Achievable

**R:** Related/Reasonable

**T:** Time bound

# TIPS FOR ACTION PLANNING

Preparing an Action Plan is just like making a list of tasks you want to accomplish in a day's work. The main differences are: more people are involved; the timing is more precise, more information is provided, and it covers much more than one day's work.

The Action Plan form we recommend using is simple and well-proven.

It starts with a heading at the top which spells out the wording of a specific Strategy. It also provides for stating the Priority involved and its Objective(s).

In our planning system we need at least one Action Plan for each Strategy.

Next, under the column reading **ACTION STEPS**, list the major steps that have to be taken to make implementation of the Strategy happen. These steps should be listed in the chronological sequence in which you believe they should be taken. They should be numbered. Each step should start with an action word, i.e. a verb.

It is not necessary to become finely detailed in listing the steps. However, the steps should not be so broad, lumpy, or abstract in their language, that we cannot later determine progress (or lack of progress) toward their completion.

Going on... for each Action Step we need to indicate who is responsible for doing it. This can be an organization unit or an individual. It is probable that in some steps more than one organization unit or individual are responsible. Whatever the case, use the **WHO'S RESPONSIBLE** column to show the parties. If more than one individual has a shared responsibility, underline, bold face or italicize the name of the most accountable person. You can use the **REMARKS** column to explain why this person is recommended to chair the joint effort.

On the Action Plan form for each step you will see there are three columns calling for dates.

**STARTING DATE** means when a step should begin. **SCHEDULED COMPLETION DATE** is your recommended deadline for finishing the step. **ACTUAL COMPLETION DATE** will be used later when we note when the step, in fact, has been completed.

The **REMARKS** column has many uses. The best Action Plans usually have many useful entries in this column.

## REMEMBER

*Participation is a key to successful implementation.*  
Consult with the organizations and individuals whom you believe should be responsible for taking action steps. Obtain their inputs. This is a bridge to gaining understanding, commitment and action.

## OTHER TIPS

Keep in mind that an Action Plan is a plan. It is meant to lay out clearly and specifically things that have to be done in the future. However, when you are immersed in preparing one, it is easy to assume it is a report on things already done, putting yourself under unwarranted stress when looking ahead to the date the Action Plan will be presented. At this point in our process, we are still planning, not doing. The doing is implementation, and it comes later.

In preparing Action Plans be careful you don't start too many steps at the same time or too soon. Some Action Plans may not even have their initial steps scheduled for several months or in some cases, even in the first year of the strategic plan. If we try to do everything at once, we can set ourselves up for frustration and a sense of failure.